Industries / E-commerce

Providing product solutions to ease life for everyone

Customer Overview

It is a locally owned and operated business, system's dealer and service provider. This is the most tenured dealer for the industry's leading manufacturers in copiers and printers. They provide solutions driven by Ricoh, RISO, Sharp, Lexmark, OKI, Hewlett-Packard, Dell, Brother and MBM. Their sales team manages and keeps track of all the records like purchasing details, organizing data, creating documentation and sending updates to customers via email. They handle all these tasks manually from managing the product listing to creating a price quote.

Project Features

- ☑ User Friendly.
- ☑ Compatible with classic and lightning.
- ☑ Showing filtered products.
- ☑ Works on custom logic.
- ☑ Calculation automation on product's price.
- ☑ Automation of Quote and Attachment.

Problem Statement

Their sales team was facing an issue while selling products. Using Standard Products Order Form (Add Products) from Opportunity, the sales team wanted to show only filtered products, but it was showing all products.

Same as standard form while choosing Price Book option it was showing all Price Book but sales Team wanted to show only filtered Price Book based on products selection.

Sales team was spending lots of time selling products, making quotes and documentation of products. Also, it was taking a lot of time preparing rules of products.

Oak Tree Solution

We have created a Custom Order Form in Opportunity that allows us to apply all filtration for showing filtered products. We have also given Price Book selection option on order form to get filtered price.

Users can easily order products based on their choice. It became easy to create automation quotes and attachment of products and automatically send it into an email to customers.

In 'Order form', we have also given the 'Edit' option to edit the products. Now they can apply automation on rules of products and calculation of price.

Positive Outcome

- ☑ Sales Team is just using one system (Salesforce) to manage their sales process.

- ☑ No Manual Data Load thus improved team efficiency.

Technologies Used

Salesforce

Apex Class

Lighting component

Vf page

Email Template

Action button